



Welcome to SFX Web Training Session 2

Valli Hoski Implementation Librarian

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Objectives

- Identify how to activate an ejournal package where you do not license all of the content the provider sells for that particular package.
- Identify how to activate a new ejournal your library has purchased in SFX
- Recognize how to batch load data into SFX
- Recognize how Proxy settings and User Parameters are used within SFX
- Recognize how SFX uses Object Lookup to display items on the SFX Menu



3

Agenda

- Activating Selective Targets
- Working With Your Collection Data For Selective Targets
- Batch Activation Using DataLoader
- Polishing Off SFX Targets
- Using a Proxy Server With SFX
- Understanding Object Lookup



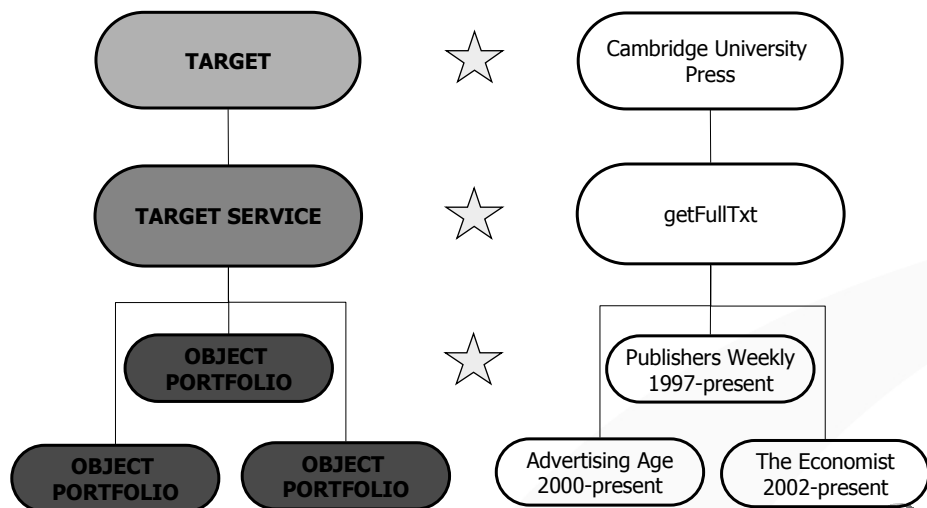
4



Activating Selective Targets

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Activating Selective Package



Activating Selective Package

#	Target	Threshold	Modified	Active	Action
1	PROQUEST (32)				
<input type="checkbox"/>	PROQUEST_5000		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_5000_INTERNATIONAL		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_ARCHIVE		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_COMPLETE		2008/02/21	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_DATELINE		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_GLOBAL		2007/08/28	N	C

- **Step 1: Activate the Target**
 - Click the 'N' button located next to the target name
 - The text will turn black and the 'N' button will become a yellow 'Y' button.

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7

Activating Selective Package

#	Service	Parser	Threshold	Modified	Active	Action
1	getFullTxt	PROQUEST:OPEN		2008/02/21	Y	C

- **Step 2: Activate the Target Service**
 - Click the 'N' button located next to service you want to expose your users to.
 - The text will turn black and the 'N' button will become a yellow 'Y' button.

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8

Activating Selective Package

#	Target	Service Object	Title	Threshold	Mod.	Act.	Action	Test	SF
1	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt:1000000000026361	Smart Business Ak...	Obj->parsedDate">="2003.undef.unde...	2008/02/11	N	C		
2	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt:1000000000026404	Agri Industry Eu...	Obj->parsedDate">="1998.undef.unde...	2008/02/11	N	C		
3	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt:1000000000026414	BBC Monitoring Fo...	Obj->parsedDate">="1998.undef.unde...	2008/02/11	N	C		
4	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt:1000000000026423	Enterprise The Sa...	Obj->parsedDate">="1992.undef.unde...	2008/02/11	N	C		
5	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt:1000000000026426	Eurotel The	Obj->parsedDate">="2001.undef.unde...	2008/02/11	N	C		

- **Step 3: Activate each Object Portfolios**

- Find the object portfolios in the list
- Search for the object and activate the object portfolio
- Batch activate the object portfolios



Working With Your Collection Data For Selective Targets

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Understanding Your Data

	A	H
63	Targets where you will use the 'DataLoader' tool:	
66	AIP_SCITATION_AMERICAN_INSTITUTE_OF_PHYS	aip
67	AIP_SCITATION_AMERICAN_SOCIETY_OF_CIVIL_	aipasc
68	AIP_SCITATION_AMERICAN_SOCIETY_OF_MECHAN	aipscm
69	AIP_SCITATION_JOURNALS	aipj
70	ALLEN_PRESS	ap
71	AMERICAN_CHEMICAL_SOCIETY_JOURNALS	acsj
72	AMERICAN_GEOPHYSICAL_UNION_AGU	agu
73	AMERICAN_MATHEMATICAL_SOCIETY	ams
74	AMERICAN_MEDICAL_ASSOCIATION	ama
75	AMERICAN_PHYSICAL_SOCIETY_JOURNALS	apsj
76	AMERICAN_PHYSICAL_SOCIETY_PROLA	apsp
77	ANNUAL_REVIEW_COMPLETE	ar
78	ANTHROSOURCE	anthro
79	ASSOCIATION_FOR_COMPUTING_MACHINERY_ACM	acm
80	BERKELEY_ELECTRONIC_PRESS	bep
81	CALIBER_UNIV_OF_CALIFORNIA_PRESS_JOURNAL	cali
82	CAMBRIDGE_UNIVERSITY_PRESS	cup
83	CELL_PRESS	cp
84	ERSCOHOST_ELECTRONIC_JOURNALS_SERVICE	eis

- In your Data Workbook, the Selective Targets Section includes
 - Target Name
 - Tab Code



11

Activate Selective Targets

	A	H
63	Targets where you will use the 'DataLoader' tool:	
66	AIP_SCITATION_AMERICAN_INSTITUTE_OF_PHYS	aip
67	AIP_SCITATION_AMERICAN_SOCIETY_OF_CIVIL_	aipasc
68	AIP_SCITATION_AMERICAN_SOCIETY_OF_MECHAN	aipscm
69	AIP_SCITATION_JOURNALS	aipj
70	ALLEN_PRESS	ap
71	AMERICAN_CHEMICAL_SOCIETY_JOURNALS	acsj
72	AMERICAN_GEOPHYSICAL_UNION_AGU	agu
73	AMERICAN_MATHEMATICAL_SOCIETY	ams
74	AMERICAN_MEDICAL_ASSOCIATION	ama
75	AMERICAN_PHYSICAL_SOCIETY_JOURNALS	apsj
76	AMERICAN_PHYSICAL_SOCIETY_PROLA	apsp
77	ANNUAL_REVIEW_COMPLETE	ar
78	ANTHROSOURCE	anthro
79	ASSOCIATION_FOR_COMPUTING_MACHINERY_ACM	acm
80	BERKELEY_ELECTRONIC_PRESS	bep
81	CALIBER_UNIV_OF_CALIFORNIA_PRESS_JOURNAL	cali
82	CAMBRIDGE_UNIVERSITY_PRESS	cup
83	CELL_PRESS	cp
84	ERSCOHOST_ELECTRONIC_JOURNALS_SERVICE	eis

- Activate your selective targets.
- Evaluate global thresholds in selective targets.
- Create local thresholds as needed.
- Use Data Loader to activate selected titles and load local thresholds.



12



Batch Activation Using DataLoader

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Step 1: Prepare Your Excel File

- Create your Excel File
 - ISSN
 - ACTIVE
 - Local Threshold (optional)
- Save your Excel File as a Text Tab Delimited File

	A	B	C	D	E	F
1	0066-4146	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
2	0066-4154	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
3	0066-4170	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
4	0066-4189	ACTIVE	Sobj->parsedDate(>=,'1996','undef','undef)			
5	0066-4197	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
6	0066-4219	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
7	0066-4227	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
8	0066-426X	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
9	0066-4278	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
10	0066-4286	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
11	0066-4308	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
12	0084-6570	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
13	0084-6597	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
14	0147-006X	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
15	0163-8998	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
16	0360-0572	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
17	0362-1642	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
18	0732-0582	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
19	1081-0706	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
20	1531-7331	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
21	1543-5008	ACTIVE	Sobj->parsedDate(>=,'2002','undef','undef)			
22	1543-592X	ACTIVE	Sobj->parsedDate(>=,'2003','undef','undef)			
23						

NOTE: SFX User Guide Part 2 Appendix G discusses how to use Excel to create SFX Thresholds

Step 2: Choose Your Target and Target Service

Welcome to DataLoader

Portfolios Update Objects Add/Remove Objects

Select Target + Service: ANNUAL_REVIEWS-getFullTxt

Select subtarget + Service: ANNUAL_REVIEWS_COMPLETE-getFullTxt

Specify input file name: C:\Documents and Sett... Browse...

- Choose which target and target service you are batch activating.
- Find your file on your computer and upload it to DataLoader.

Step 3: Finish Your DataLoad

Select the type of each column in your input file:

Column 1 (Primary Key)	Column 2	Column 3
ISSN	AVAILABILITY	LOCAL THRESHOLD
Column 4	Column 5	Column 6
Column 7	Column 8	Column 9

Load Type: Update Portfolios
 Remove Portfolios
 Activate target(s) / target_service(s)
 Report Mode - Do Not Update the Database

Submit

- Let DataLoader know what's in your file's columns
- Choose the Update Portfolios Option to batch activate
- Click Submit!

Step 4: Check for Errors

DataLoader Successful	
Mode:	Portfolios
Input file:	annualreviews.txt
Summary:	Added 0 portfolios, updated 22 portfolios for: ANNUAL_REVIEWS_COMPLETE-getFullTxt
An analysis of the data file can be found in: annualreviews.txt.ok.err	Download
A 'cleaned' copy of the data file can be found in: annualreviews.txt.ok	Download
A log of the dataloader run can be found in: dataloader.log	Download
If you want to activate added/updated target(s) target_service(s)	Activation

- Dataloader Provides you with 3 files
 - A Log
 - The file you submitted
 - An Error Report
- Download the Error Report and check for any errors

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17

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Polishing Off SFX Targets

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Objectives

- Configure your proxy server to work with SFX
 - Understand how to proxy resources in SFX
- Set up basic targets that require U/P values
 - Understand why SFX needs U/P information to create links
- Understand how SFX uses Object Lookup to display items on the SFX Menu

Polishing off your SFX Targets

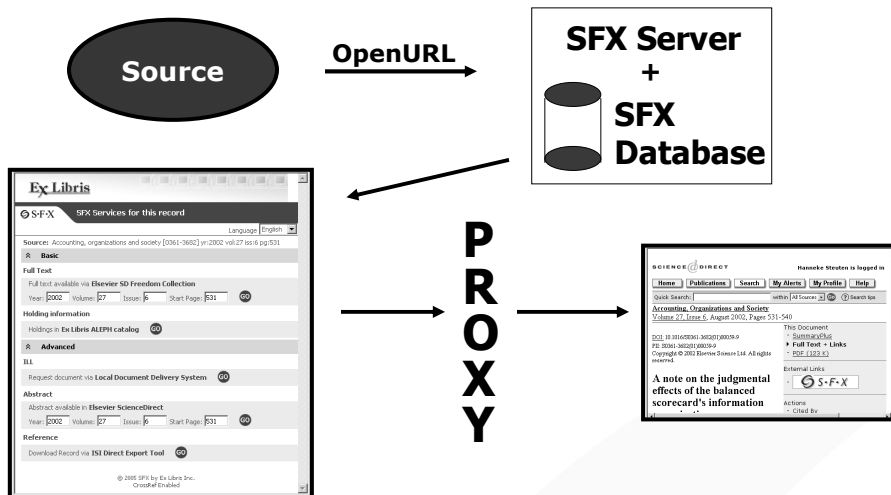
- In order to activate a target you need to:
 1. Activate the target
 2. Activate the target service
 3. Activate the object portfolio
- However there are other options available that can improve linking and help you maintain SFX.



Using a Proxy Server with SFX

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Using a Proxy Server with SFX



Using a Proxy Server with SFX

- Input the proxy server's information under
Administrator Tools → Menu Configuration → Proxy Settings
- Choosing to implement a selective proxy?
 - Check the proxy box located at the **Target Service** level of targets that need to be proxied

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Using Usernames and Passwords

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Using Usernames and Passwords

The screenshot displays the SFX Admin Center interface. At the top, it says "S·F·X ADMIN CENTER" with navigation links for "Sources", "Targets", and "Search Objects". Below this is a section titled "List of Target Services for EBSCOHOST_ACADEMIC_ABSTRACTS_FT_ULTRA". This section includes buttons for "Add New Service", "Activate All", "Deactivate All", "Show All", "Show Active", "Show Inactive", "Delete", "Activate", and "Deactivate". It also states "Available: 2 services Database: tulie Target: EBSCOHOST_ACADEMIC_ABSTRACTS_FT_ULTRA [Back to Target]".

#	Service	Parser	Threshold	Modified	Active	Action
1	getFullTxd	EBSCO_HOST:ebso...				
2	getTOC	EBSCO_HOST:ebso...				


Below the target services is a "List of User Parameters" window. It shows "Available: 1 records Database: tulie" and a "Filter List on Institute: - Not Filtered -" dropdown. The table below contains one record:

#	Target Service	Institute	Flag Name	Flag Value
1	EBSCOHOST_ACADEMIC_ABSTRACTS_FT_ULTRA-getFullTxd	DEFAULT	\$\$\$USER_ID	

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25

Using Usernames and Passwords

- After clicking the  fill in the "flag" values
- Determine what information to input in the "flag" using the **Target Configuration Guide** found on the SFX Documentation Portal

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26



Understanding Object Lookup

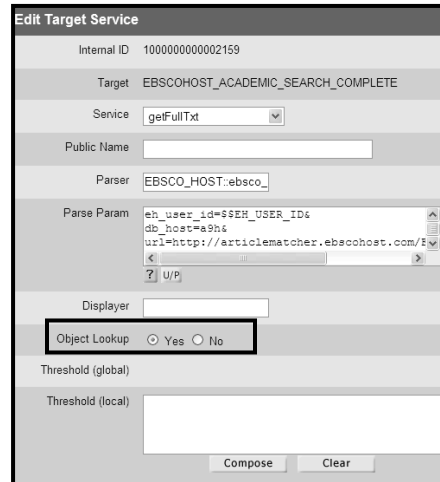
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Object Lookup: Two Types Of Targets

- **Targets with Object Portfolios**
 - Links to individual bibliographic items
 - Target displays on the menu only if it contains that specific bibliographic item.
- **Targets without Object Portfolios**
 - Links to searches or general web based services.
 - Not connected to an individual bibliographic item.

Object Lookup: Using Object Portfolios

- Object Lookup determines whether or not Object Portfolios are available for a target service.
- Object Lookup can be turned on or off at the target service level



The screenshot shows the 'Edit Target Service' configuration page. The 'Object Lookup' option is checked, indicating it is turned on. Other visible fields include: Internal ID (100000000002159), Target (EBSCOHOST_ACADEMIC_SEARCH_COMPLETE), Service (getFullTxt), Parser (EBSCO_HOST:ebSCO_), and Parse Param (eh_user_id=\$SEH_USER_ID&db_host=a9&url=http://articlematcher.ebscohost.com/). There are also fields for Public Name, Displayer, Threshold (global), and Threshold (local), along with Compose and Clear buttons.

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Practice: Activating Selective Targets



Exercise 2.1 – Activating a Selective Package Target

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try finding an object record.



Exercise 2.2 – Activating One Title in a Selective Package

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try finding an object record.

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Practice: Batch Activation Using DataLoader



Exercise 2.3 – Batch Activating a Select Group of Object Portfolios

Using the knowledge you just learned, your own data, and the steps outlined in the SFX Exercises booklet, try activating object portfolios using DataLoader.

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31

Practice: Setting Up Your Proxy Server



Exercise 2.4 – Inputting your Proxy Server Information

Using the knowledge you just learned, your own data, and the steps outlined in the SFX Exercises booklet, try activating object portfolios using DataLoader.



Exercise 2.5 – Setting Up A Selective Proxy

If you have chosen to implement a selective proxy, use the information you just learned to configure your targets.

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Practice: Set Up Username /Password Information



Exercise 2.6 – Inputting your Username/Password Information

Using the information in the Target Configuration Guide add username/password information to SFX.

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www.exlibrisgroup.com/sfx.htm

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